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R&I EXCLUSIVE: THE 1987 JOB$ SUI

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JUNE 10, 1987

A Cahners publication serving the total foodservice industry

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THE JUGGLING ACT

In a comparison of divorce rates among foodservice personnel from 1981 to 1986, company presidents appear to have the best hold on keeping a relationship together.

	Divorce/Separation Rate	
	1981	1986
Owner	8.3%	10.5%
President	12.0	4.0
Vice pres.	10.1	9.2
Reg. mgr.	12.0	9.1
Unit mgr.	10.9	11.0
Asst. mgr.	10.4	5.1
Foodservice director	10.9	11.9
Dietitian	7.0	8.8
Food and bev. director	13.1	14.9
Asst. food and bev. dir.	11.1	9.1
Chef	13.4	10.9
Cook	16.1	7.5

Source: *Restaurants & Institutions'* annual Jobs survey

Janet and Howard Melvin of the Heritage

■ **CONSORTIUMS**

Husband-Wife Teams: Ultimate Dedication

With the right combination, spouses can team up for profit and pleasure.

Operating a restaurant together and nurturing a relationship at the same time can be a risky venture, but the rewards are there for couples who make the commitment.

Communication is the key to avoiding the numerous pitfalls a foodservice collaboration can create, says Helen Dylag, director of the Marymount Center of Health Styles in Garfield Heights, Ohio.

"Couples need to be good communicators before entering a business arrangement," says Dylag. "They need experience at solving stressful situations together in their personal lives. If there is a personal problem, it is bound to show up in business."

The first step for many couples is a definition of roles, anticipating and determining who has the right skills for the various tasks.

For Jasper and Nancy White of Restaurant Jasper in Boston, the relationship was strained in the beginning because their responsibilities overlapped too much. Yet Jasper says they have learned to double check each other without overriding each other's decisions.

"For the most part we work separately," says Jasper White. "On a given day, four or five hours could go by without saying a word."

At The Heritage in Cincinnati, Janet Melvin says dividing the territory with husband Howard helps them show each other where improvement is needed because they can step back and analyze each others' duties.

But even with the best husband-and-wife teams, problems are impossible to avoid. Anxiety may stem from finances, uncertainties and preoccupation with the day-to-day stresses.

"The inescapability of the business can cast shadows on all parts of life," says Dr. David Charney, director of Roundhouse Square Psychiatric Center in Alexandria, Va. "It can create a loss of creativity and perspective. When things look bad and both of you are fully aware of that, you feel like you are in a little submarine together with no other occupants and the world looks gloomy."

Charney recommends trying to solve problems together. It is healthy and shows mutual respect. "Candid conversation often results in interesting ideas," he says. "And don't conceal problems. Your partner might have a handy solution."

Husband-and-wife teams should also spend time apart without feeling guilty about it. Jasper White says taking separate nights off from his wife helps them keep their lives in perspective and not to take each other for granted.

When all is said and done, however, the pluses of working with one's spouse in the restaurant business outweigh the minuses. And perhaps most importantly, couples are able to be together in a business that tends to keep couples apart.

"I don't see how we could get to see each other if we didn't work together," says Jasper White. "If you don't share the project it could put a strain on the relationship. I see it as a necessity for a happy marriage." —*J.W.*

■ ECONOMIC EXPERTS

What Economists Say Now

Early in 1987, attention turns to interest rates and trade issues.

With nearly half the year behind us, it is time to take stock and re-evaluate the twists and turns of economic activity and the top issues of 1987: interest rates and the trade situation.

The near-zero rate of inflation we were blessed with for much of last year has not been sustained. Even though prices will not shoot up this year, the expected one or two point increase is expected to lift interest rates by a comparable amount.

The first quarter's strong performance in real GNP has made the Federal Reserve Board unwilling to take the measures to ensure interest rate stability. Further cuts in interest rates, it is feared, would only lead to increased inflation. With many banks recently raising their prime rate, it is probable that the Fed's next move will be to raise rates.

One implication of rising prices and interest rates is that purchasers tend to accelerate their buying plans. While the foodservice industry is more restricted in its purchasing patterns than many other industries, given the short shelf-life of many products, changes in purchasing strategies might be appropriate for products that are less perishable.

Currently, inventories are lean throughout the economy. Having learned to better manage inventories at a time when it was expensive to hold them, purchasing managers are now having to re-evaluate these strategies. Because prices are expected to rise more rapidly in the coming months, it makes more sense to build up buffers now.

The manufacturing trade deficit approached $150 billion last year. While the falling value of the dollar will eventually help to correct this situation, the fact that it has had such a limited effect thus far is causing concern.

Foodservice operators should keep a keen eye to the international trade discussion. Today's political smoke could turn into tomorrow's import quotas or tariffs—and food products might yet turn into a target. Until the trade problem resolves itself—and, have no fear, it is already beginning to do so—there might be some legislative or administrative actions that will affect the foodservice operator. If a tariff or quota is imposed on products that an operator buys, like everyone else, he'll be paying higher prices. ***—Kim Kennedy***

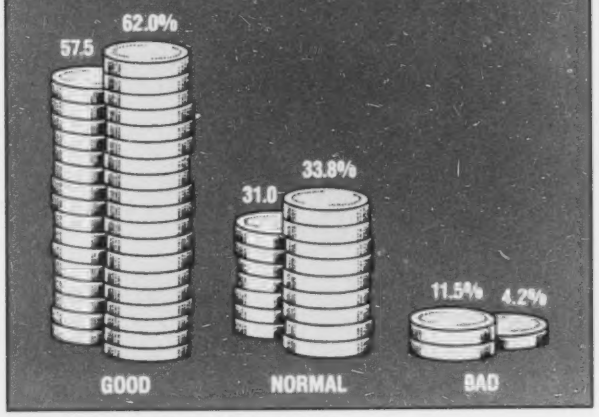
Kim Kennedy is a member of Cahners Department of Economics.

■ R&I DATA

SALES NOW: BIG IMPROVEMENT SHOWN

Good news from all segments of foodservice. Commercial operations reporting sales as good increased by 53% during April. The hotel and motel segment led the way, as 65% reported good sales in April. Full-service operators claimed the best overall sales climate, while only 48.4% of fast-food operators said sales were strong in April. Optimism also prevailed on the institutional side as 75% of colleges and universities reported good sales.

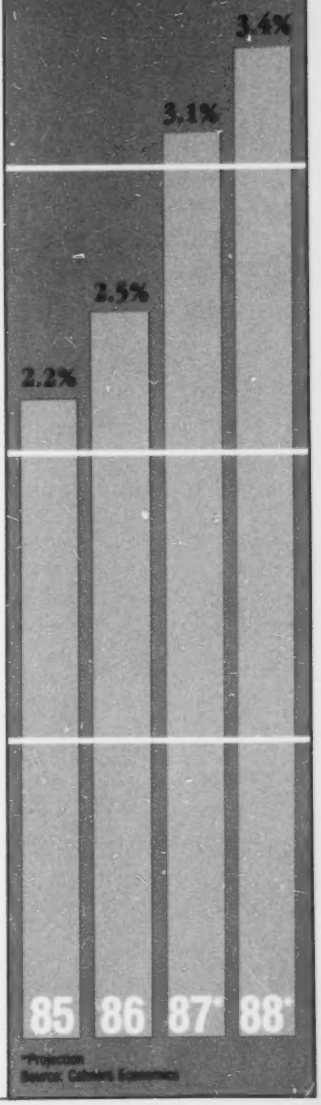
■ Commercial ■ Institutional



ECONOMY GAINS MOMENTUM

Economic activity will pick up speed this year and next, aided by a stronger trade position and inventory building.

REAL GNP
(GNP minus inflation)



*Projection
Source: Cahners Economics

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R&I EXCLUSIVE

R&I RESTAURANTS & INSTITUTIONS

■ ANNUAL JOBS SURVEY

R&I's ANNUAL JOBS SURVEY BRINGS INTO SHARP FOCUS THE PERKS AND PROBLEMS OF YOUR WORK AS A FOODSERVICE EXECUTIVE. RECORDED IN BLACK AND WHITE ARE DATA MEASURING EVERYTHING FROM LAST YEAR'S RAISES TO CHANGES IN BENEFITS TO YOUR DREAMS FOR THE FUTURE. BUT THE FACES GLIMPSED IN THESE PAGES TELL A VISUAL STORY THAT GOES BEYOND NUMBERS—ONE OF PROFESSIONALISM AND OF PRIDE IN A JOB WELL DONE.

A CANDID LOOK AT YOUR JOB

—Toni Lydecker and Jeff Weinstein
—Photography by Joseph Sterling

1987 JOBS SURVEY

Money matters: The 2,495 foodservice professionals responding to *R&I*'s annual Jobs Survey reported healthy earnings of $33,700, on the average—up from $29,300 in 1985.

For the first time, female executives outearned their male counterparts in five categories: president and CEO, assistant unit manager, dietitian, assistant food and beverage director, and cook. (The salary comparison for president and CEO was skewed by the small number of female respondents, but tracking ability should improve in the future, as more women enter the top executive ranks.)

Despite these gains, however, salaries of female professionals lagged behind those of men in the same jobs by a substantial 28.7%.

Salaries were nearly $3,000 higher than the mean in the West, followed (in descending order) by the South, Northeast and Midwest. Fast-food companies and private clubs pay top dollar for executive skills.

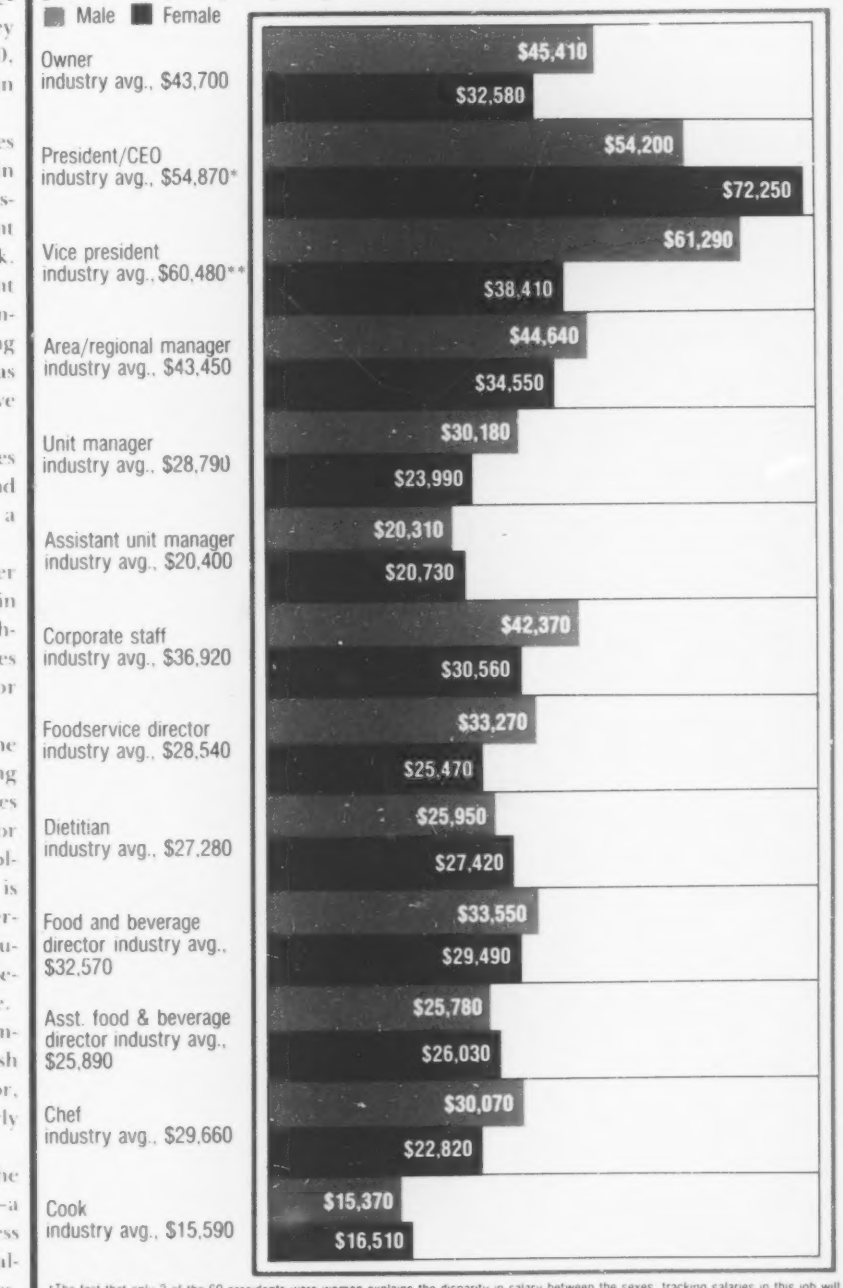
An executive also can improve the odds for landing a good salary by hiring on with a large company: Annual sales exceeding $500 million are optimal for the commercial sector, while sales volume of $50 million to $100 million is the right range for institutional. Overall, however, salaries offered by institutional employers lag nearly $7,000 behind those in commercial foodservice.

But executives who prefer the comforts and security of perks to hard cash should choose the institutional sector, which outshines commercial in nearly every category of benefits.

Raise time meant 7.2% more in the pockets of foodservice executives—a nice piece of change, but a little less than the 7.7% raises of 1985. Regionally, the Midwest gave the smallest raises, suggesting that salaries there will con-

CHARTING SALARIES BY SEX

Women outearned their male counterparts in five occupations this year—a sizeable change over 1986, when female foodservice professionals lagged behind men in every job category. These gains mark only a beginning, in light of a 28.7% earnings difference between the sexes.



*The fact that only 2 of the 60 presidents were women explains the disparity in salary between the sexes; tracking salaries in this job will become easier as more women enter the executive suite. **A large proportion of vice presidents in this year's survey work for large companies, creating a startling result: Vice presidents earning more than presidents.

RESTAURANTS & INSTITUTIONS

YOU'RE MAKING $33,700, ON AVERAGE, 7.2% MORE THAN LAST YEAR. TO EARN TOP DOLLAR, CONSIDER HIRING ON WITH A LARGE COMMERCIAL COMPANY IN THE WEST. IF YOU'RE A WOMAN, KEEP AN EYE ON JOBS OFFERING EQUAL PAY.

RAISES: WHO GETS THE MOST?

Raises averaged 7.22%, about the same as last year. Professionals already in a high-income bracket were more likely to receive big raises; at 12.14%, presidents and CEOs were clearly the leaders.

Position	Mean(%)
Owner	9.5
President/CEO	12.1
Vice president	9.5
Area manager	7.4
Unit manager	7.6
Assistant manager	6.2
Corporate staff	8.0
Foodservice director	6.1
Dietitian	5.1
Food & beverage director	7.6
Asst. food & bev. director	7.6
Chef	7.5
Cook	5.1
Total	7.2

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1987 JOBS SURVEY

tinue to trail those in the rest of the country.

Slightly more than half of the executives expressed satisfaction with their raises. Company presidents were the happiest group, while assistant unit managers were the most disgruntled.

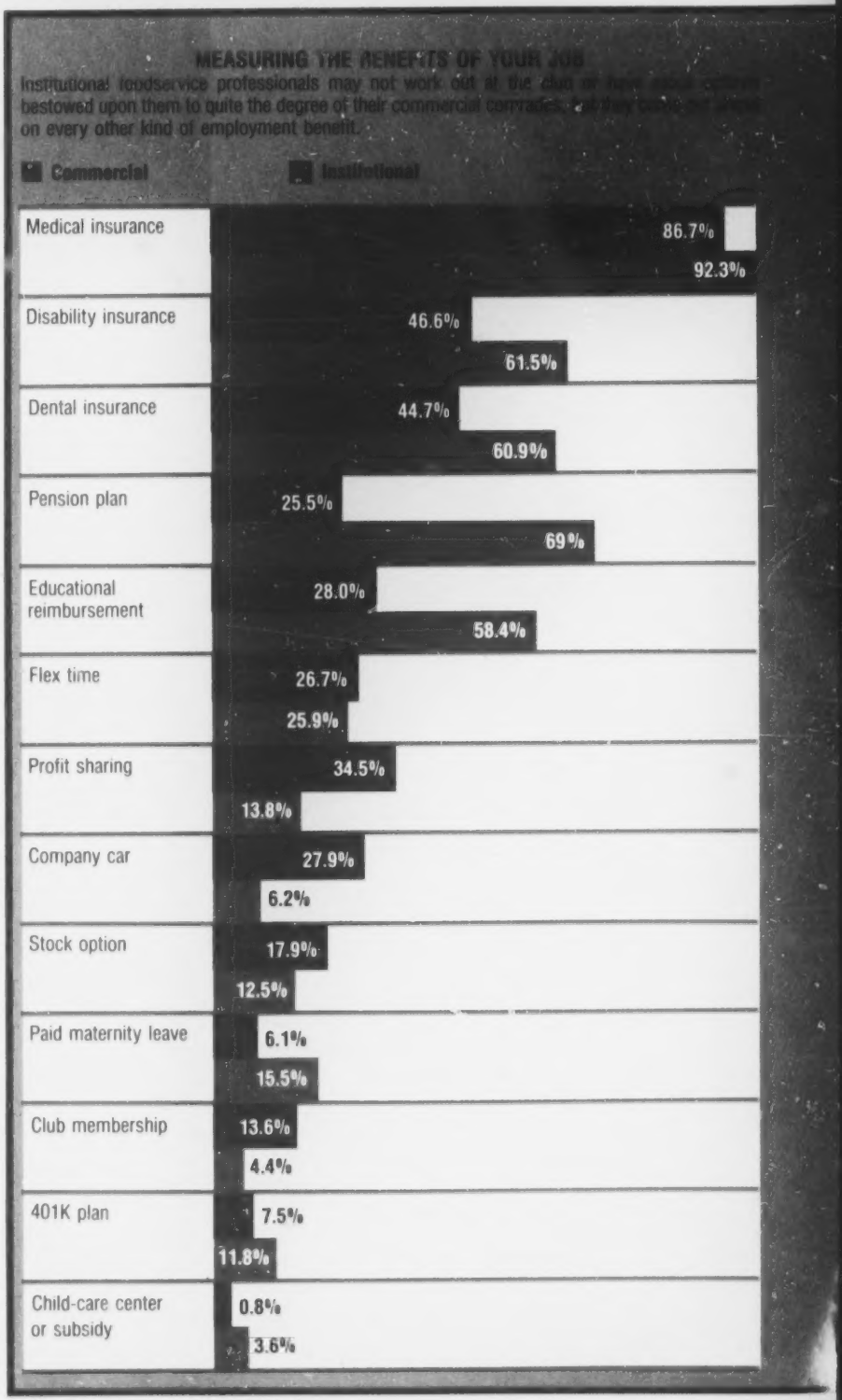
Boning up on bonuses: Although 42% of foodservice professionals receive part of their compensation in the form of bonuses, the extra money accounts for only 8.6% of their total income. Bonuses are most common among vice presidents, area and regional managers, and unit managers, more than 60% of whom received bonuses during 1986. Fast-food companies and fine-dining restaurants are more prone than other employers to incorporate bonuses into the compensation package.

Bonus givers are partial to broad criteria; 42.8% look at the executive's performance in both sales and QSC (Quality/Service/Cleanliness), rather than one area or the other.

About 19% of foodservice professionals say their companies have recently changed their compensation structure to link pay to performance. Of those whose employers have made such a switch, three-quarters think the new standards are fair.

Companies in flux: Layoffs are widespread, with more than 45% of survey participants reporting that their companies have cut staff during the past year. Hotels and employee-dining establishments are the segments most likely to give staff members their walking papers.

A majority of foodservice pros approve of the trim-down, but opinion differs according to occupation. Owners and presidents think the changes are for the better, mid-level management split down the middle, pro and con, and dietitians are convinced the



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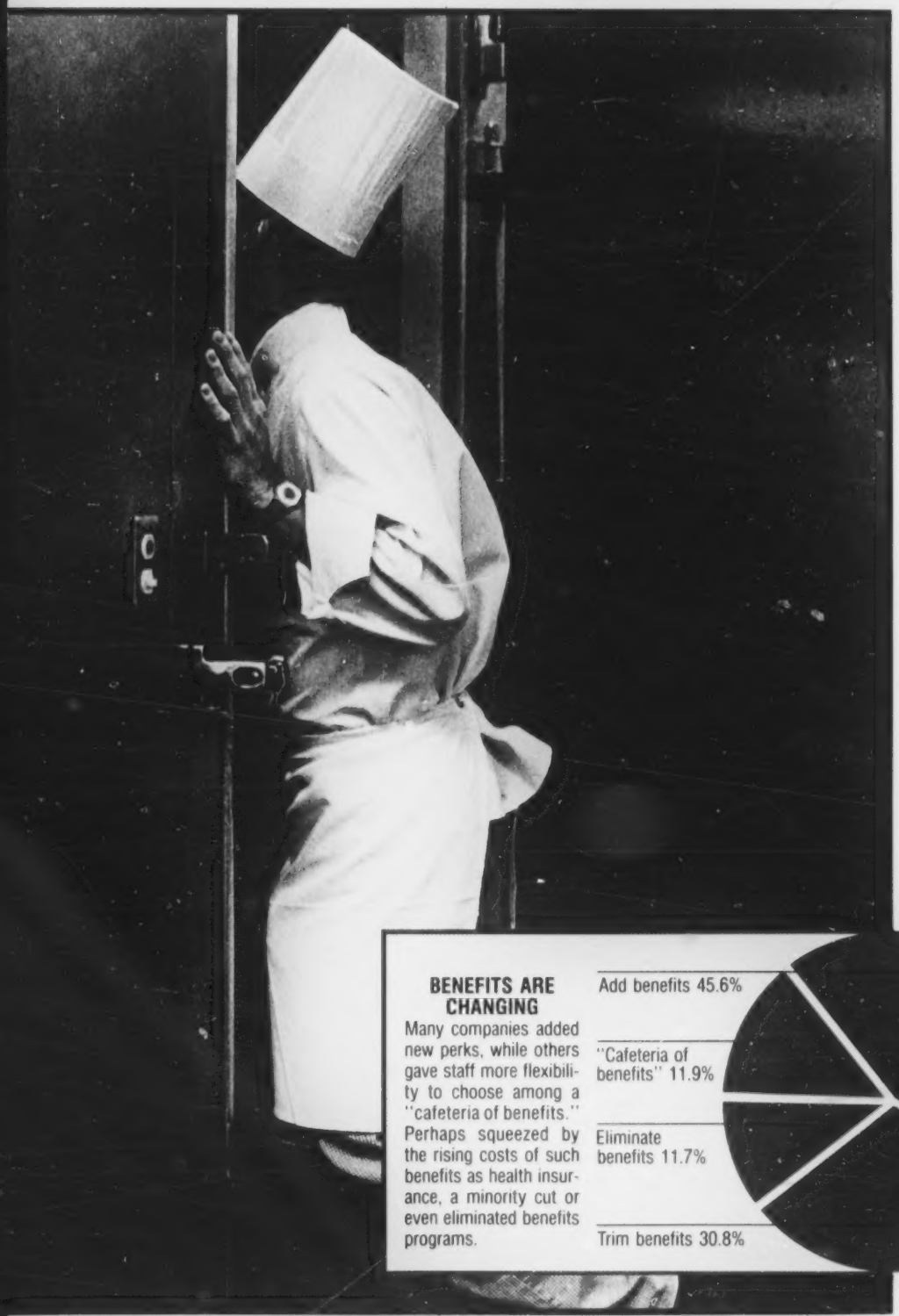
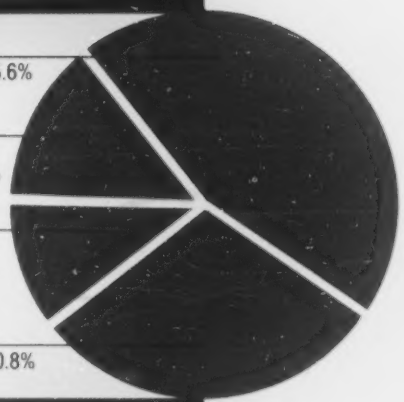


MANY OF YOU ARE PUTTING YOUR PERFORMANCE ON THE LINE TO EARN GOOD SALARIES AND BONUSES. BENEFITS ARE BEST IN THE INSTITUTIONAL SECTOR, BUT IF YOU'RE AFTER HARD CASH, GO COMMERCIAL.

BENEFITS ARE CHANGING

Many companies added new perks, while others gave staff more flexibility to choose among a "cafeteria of benefits." Perhaps squeezed by the rising costs of such benefits as health insurance, a minority cut or even eliminated benefits programs.



1987 JOBS SURVEY

cutbacks will hurt the company.

More merging than purging: Mergers shook up nearly one-quarter of the respondents' companies, but few foodservice executives were personally affected—a scant 3.1% lost their jobs. Bitter feelings run high among those who were ousted, however; 69% say they were treated unfairly.

One reason might be the scarcity of golden handshakes. Few executives received more than one week of salary for each year of service, and many received no severance pay at all. Moreover, only a minority of companies continued insurance beyond the date of termination or paid for outplacement assistance.

Yet another form of corporate upheaval, relocation, affected only 8.4% of surveyed executives. The correlation between company size and being asked to pull up roots is strong. An executive working for a company with more than $500 million in sales had a 31% chance of relocation, compared to odds of only 3.4% for an executive working for an institutional employer with sales below $500,000.

Have all these changes shaken executives' faith in their company? Yes and

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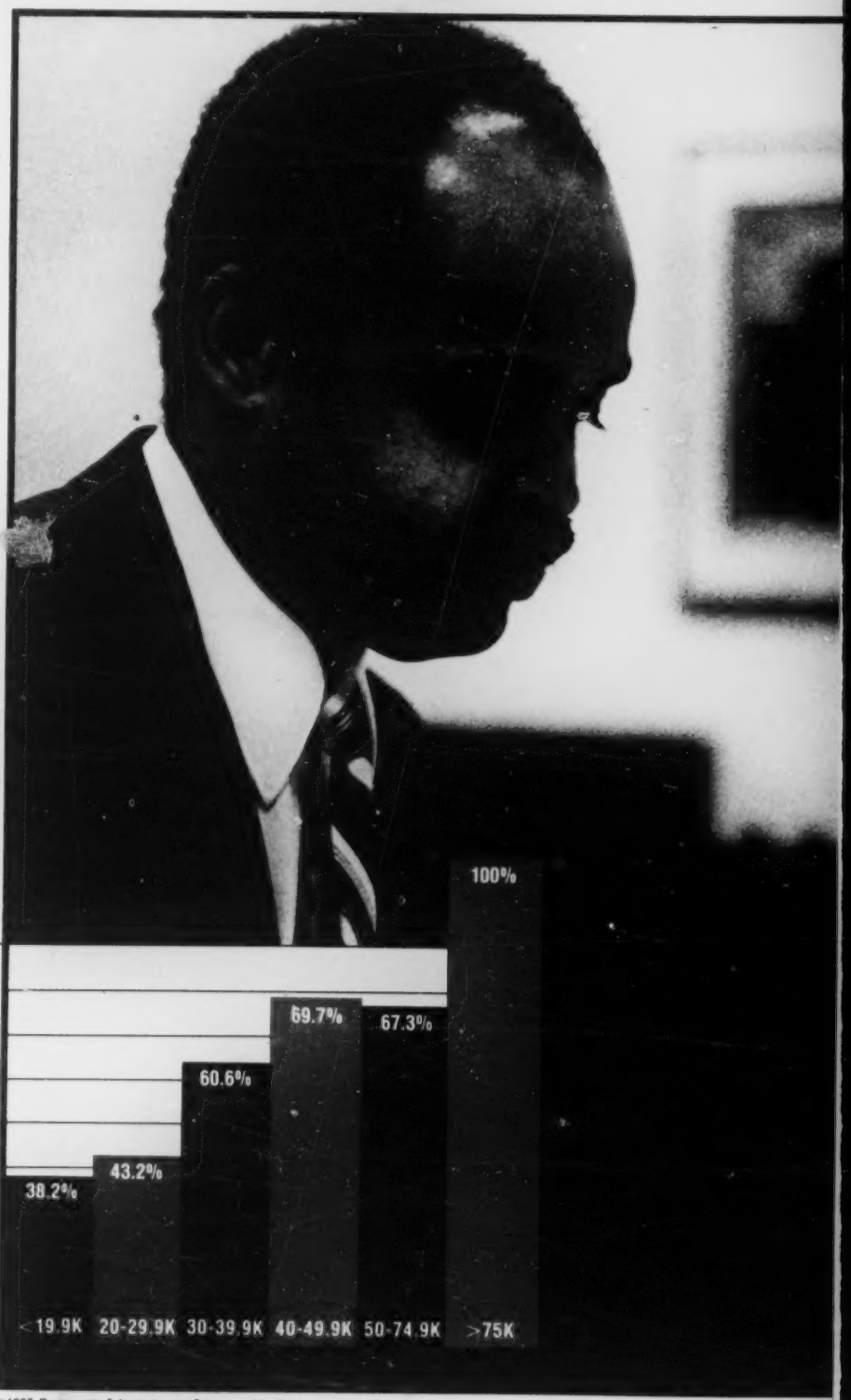

MAKING A MOVE ON THE COMPANY

The rich get richer . . . respondents making more than $75,000 invariably relocated at the company's expense, while only a minority of those earning less than $20,000 were reimbursed fully by the company for their moving expenses.

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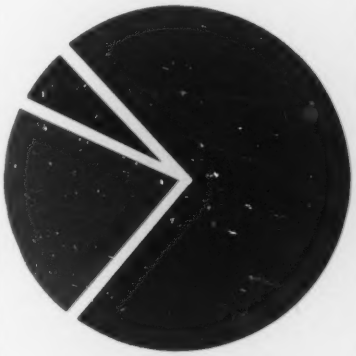
COMPANIES ARE CHANGING, WITH MERGERS, LAYOFFS, AND RELOCATION BECOMING THE NORM. AS A GROUP, HOWEVER, YOU'RE KEEPING YOUR COOL AND KEEPING YOUR JOBS. MOREOVER, MANY OF YOU LIKE THE CHANGES.



AFTER THE MERGER: WHAT HAPPENS TO YOUR JOB?

The epidemic of mergers didn't faze food-service professionals, almost all of whom remained on the company payroll.

- Kept job 86.5%
- Changed jobs within company 10.3%
- Lost job 3.2%

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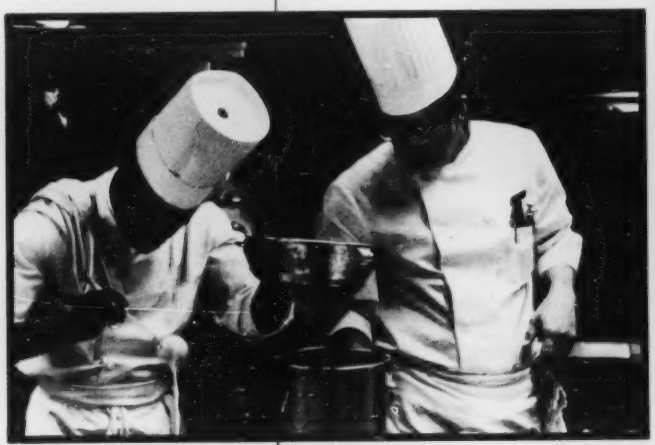


1987 JOBS SURVEY

THOSE OF YOU IN INSTITUTIONS AND HOTELS TRAIN THE HARDEST. MANAGERS IN FAST FOOD WILL HAVE TO SPEED UP TO KEEP PACE IN ACQUIRING NEW SKILLS.

no. Only 19.4% of all respondents indicate that their companies do not live up to their commitments to staff. But confidence dwindles on the question of the executive's future with the company; only one-third think their company has a clear career path laid out for them.

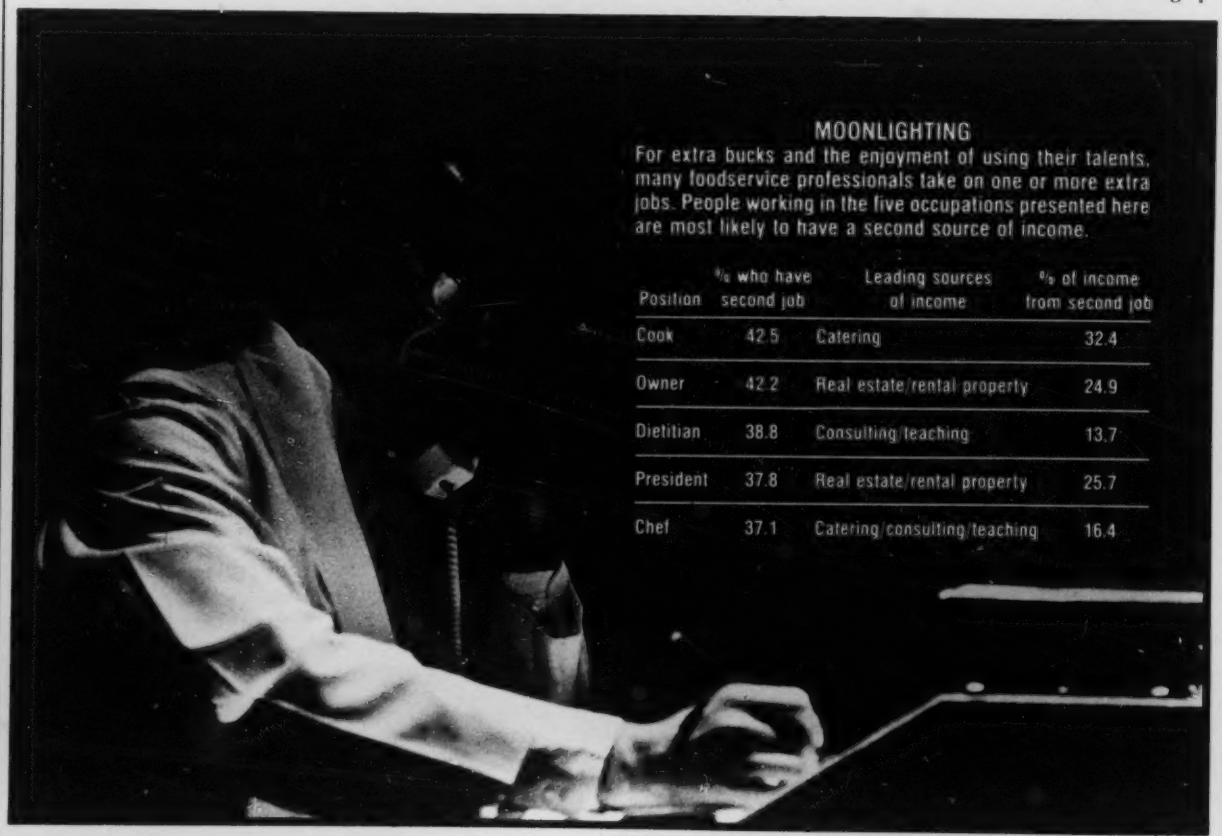
Moonlighting: About one-third of the foodservice professionals supplement their salaries with income from another source—a spouse's earnings, retirement income, investments or second jobs.

Most company owners and presidents obtain the income from a business they own, while the opposite is true of professionals in other occupations. In a surprisingly large number of cases, 65.5%, the extra earnings do not come from a foodservice-related business.

Future concerns: With greater emphasis being placed on service today, training and development is playing a

more active role in operational activities. Surprisingly, however, 22% of unit managers and assistant managers spent no time in training last year, while fewer than 25% trained for more than 15 days. The hotel and motel segment averaged the greatest amount of time (9.3 days a year) in training. Fast-food operations and private clubs trained the least, averaging 7.9 and 7.4 days, respectively.

On the institutional side, training ap-



MOONLIGHTING

For extra bucks and the enjoyment of using their talents, many foodservice professionals take on one or more extra jobs. People working in the five occupations presented here are most likely to have a second source of income.

Position	% who have second job	Leading sources of income	% of income from second job
Cook	42.5	Catering	32.4
Owner	42.2	Real estate/rental property	24.9
Dietitian	38.8	Consulting/teaching	13.7
President	37.8	Real estate/rental property	25.7
Chef	37.1	Catering/consulting/teaching	16.4

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1987 JOBS SURVEY

HAVING A SECOND SOURCE OF INCOME PAYS OFF FOR ONE-THIRD OF YOU, MAKING YOU LESS DEPENDENT ON THE MAIN EMPLOYER OR BUSINESS.

pears to have a greater priority. More than 37% of assistant food and beverage directors spent more than 15 days in a training mode. The strict regimen of military and correctional facilities shines through in the survey results. They trained more than any other segment of the industry, averaging 11 days a year. Conversely, employee-dining personnel spent only 6.8 days soaking up new knowledge and skills.

If you were wondering why cooks are cooks and chefs are chefs, consider this: 43.8% of cooks spent no time in training last year, while 34% of chefs spent more than 15 days furthering their education.

Fight for the right: Unfortunately, discrimination, in numerous forms, still exists. Even more unfortunate are survey results that show 62% doing nothing in response to perceived discrimination.

It reaches even the top echelons; a large number of company presidents and vice presidents say they have felt discriminated against on the basis of

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TRAINING ONLY EIGHT DAYS A YEAR

The average amount of time an organization spends on training management personnel is only 8.5 days a year. On the commercial side, hotels and motels spend the most time training. Institutionally speaking, employee-dining services spend the least time training.

Commercial (Mean=8.5 days)

None—20.8%

1-3 days—17.1%

4-7 days—17.4%

8-14 days—12.8%

More than 15 days—32.0%

Institutional (Mean=8.6 days)

None—8.2%

1-3 days—16.1%

4-7 days—29.0%

8-14 days—24.2%

More than 15 days—22.5%

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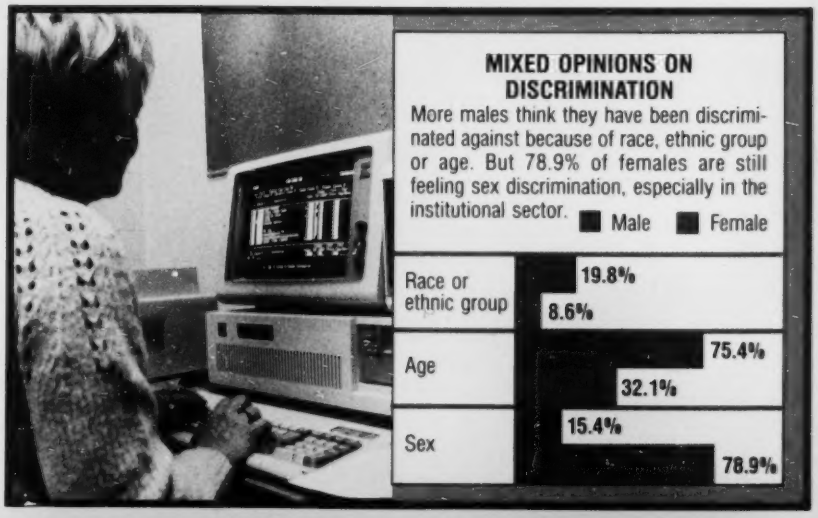
1987 JOBS SURVEY

DISCRIMINATION WAS A COMPLAINT EVEN AMONG TOP EXECS, BUT FEW OF YOU TOOK ACTION. TOO BAD, BECAUSE MOST COMPANIES HAVE POLICIES AGAINST IT.

race, ethnic group and age. More than 62% of unit managers and assistant unit managers have felt discriminated against because of their age. Sex discrimination was the complaint of 70% of dietitians.

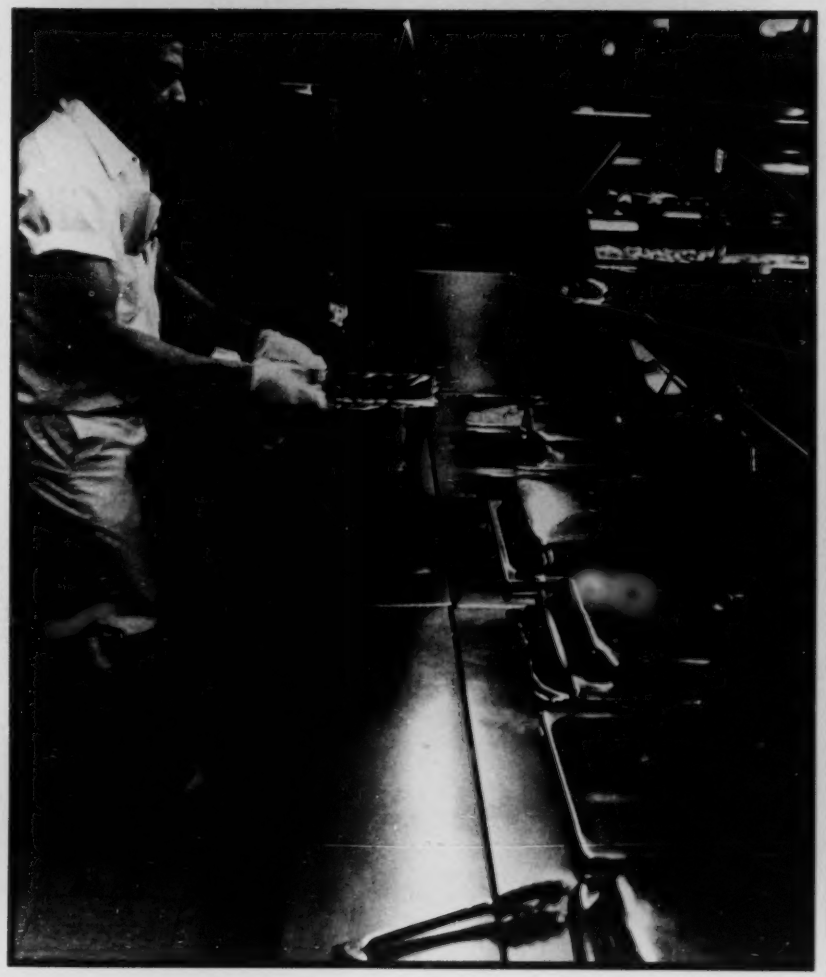
When it came time to strike back, assistant food and beverage directors were the most likely to leave the organization. Cooks and chefs (17%) were the most vocal in voicing their displeasure, while 83% of corporate staffers did nothing at all.

Even though an overwhelming number of respondents did nothing about perceived discrimination, 72.5% of the organizations polled have a publicly stated anti-discrimination policy. More than 90% of institutional operations report having policies in place, compared to 59% on the commercial side (only 45.9% of fine-dining operations).



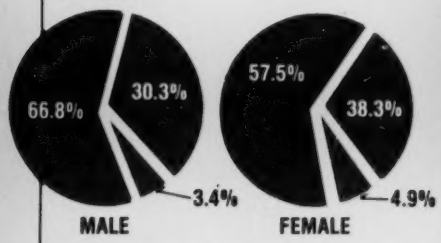
MIXED OPINIONS ON DISCRIMINATION

More males think they have been discriminated against because of race, ethnic group or age. But 78.9% of females are still feeling sex discrimination, especially in the institutional sector.



LITTLE RESPONSE TO PERCEIVED DISCRIMINATION

The survey shows that most foodservice professionals are afraid to speak out against perceived discrimination. In a majority of the cases, they either say nothing or leave.



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1987 JOBS SURVEY

YOU'RE ACHIEVERS, FOR WHOM GOING TO SCHOOL IS SECOND NATURE. BUT JOB DEMANDS SOMETIMES TAKE THEIR TOLL ON YOUR PERSONAL LIFE.

Love story: In the past five years, the marriage rate of foodservice professionals has stayed virtually unchanged. The number of singles has increased to 18.6% from 17.4% of the foodservice work force. Divorces and separations have inched up from 9.1% to 10.2% since 1982.

Survey results show regional managers and assistant food and beverage directors are more likely to marry today than in 1982. Vice presidents and cooks show a penchant for the single life.

Food and beverage directors remain the most likely to divorce or separate, as 15% reported that status in 1987. The biggest increase in divorce rates occurred among owners (7.2% in 1982, compared to 10.5% in 1987). Presidents, assistant managers and cooks appeared to have a better handle on their love lives, showing a marked decrease in divorces.

Balancing act: A job in this industry is very demanding, but foodservice pro-

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YOUR EDUCATIONAL & MARITAL MAKEUP

This year's Jobs Survey asked respondents to state their educational attainment, degree obtained, marital status and number of children. A profile follows.

Educational Attainment	
Less than high school	1.6%
High school graduate	12.8
Some college	32.3
Bachelor's degree	35.2
Advanced degree	14.7
Culinary degree	7.7
Other	5.0

Degree or Major	
Business	27.7%
Dietetics	22.9
Liberal Arts	15.0
Restaurant & Hotel Mgmt.	25.3
Education	3.1
Business School grad	0.6
Other	14.4

Marital Status	
Married	66.4%
Divorced/separated	10.2
Unmarried, but living with someone	2.9
Single	18.6
Widowed	1.9

Presence of Children	
Have children	65.0%
No children, but plan to have some	17.7
No children, do not plan to have any	17.3
Average number of children	2.5

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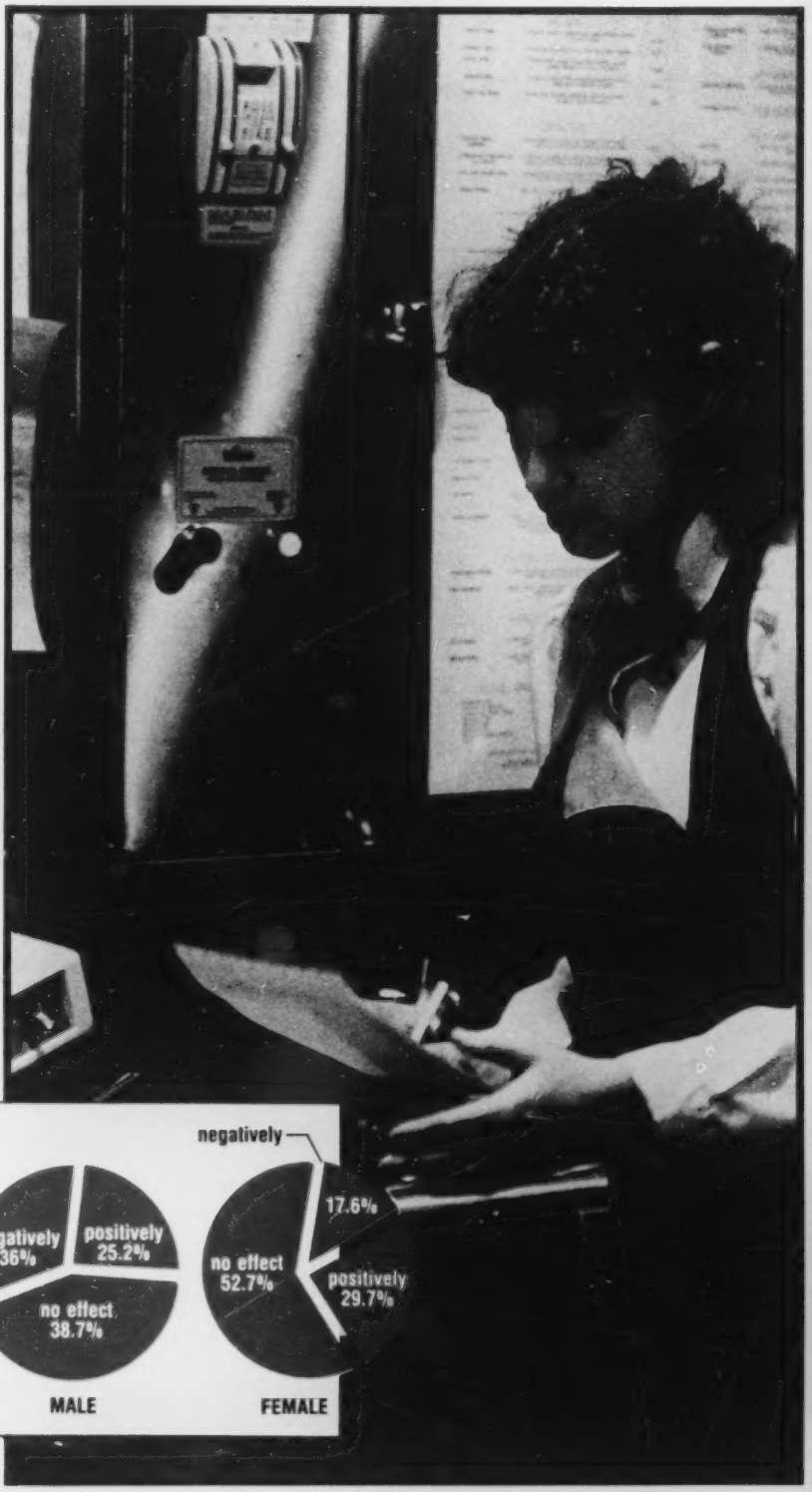
1987 JOBS SURVEY

DIVORCES ARE UP, BUT MOST OF YOU FIND WAYS TO MIX MARRIAGE WITH WORK. OTHERS PREFER THE PLEASURES OF THE SINGLE LIFE.



fessionals are finding the time to raise a family, averaging 2.5 children per household. Assistant unit managers appear the most anxious to join the parental ranks; 38.7% plan to have children, compared to a 17.7% average. Corporate staffers and assistant food and beverage directors show the greatest hesitation about starting a family.

Foodservice professionals are getting better at juggling married life and a career. Both males and females are reporting their careers are having a more positive effect on their relationships than in the past. Cooks and company presidents, an odd couple, report their careers are having little affect on their family and social lives—an average of 43% say their careers have no affect on their private lives.

However, not everyone is painting a rosy picture. Not surprisingly, 43.7% of unit managers and 50.7% of assistant unit managers say their career is having a negative affect on their relationships.

continued from page 74

FOR BETTER OR FOR WORSE

By comparing the survey results from 1985 and 1986, it appears both men and women are gaining a better handle on balancing a career and a relationship. These charts show how foodservice careers affected a relationship in 1986.

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1987 JOBS SURVEY

SOME OF YOU ARE MOVING ON—PERHAPS BECAUSE OF A SETBACK, SUCH AS LOSING A JOB, BUT MORE OFTEN TO PURSUE A NEW CHALLENGE.

Although only 6.6% of dietitians report having problems, about 47% of food and beverage directors are looking for ways to cope with the long hours. Overall, 39.2% in commercial settings are feeling the negative consequences, compared to only 17.5% in institutional settings.

Getting ahead: The average foodservice professional has worked for 3.1 companies and made a job change for more responsibility, advancement and money. Company presidents have shown the most stability, while chefs and food and beverage directors have changed jobs most often.

Making a change to start a business was the top motivator among presidents and vice presidents. But top-level executives also were fired more than the industry average.

Assistant unit managers were the most likely group to be fired. They also were motivated to make a change to attend school or to obtain better working hours.

Dietitians showed the most concern for their families. Approximately 6% left their jobs to start families, compared to a 1.6% average. More than 13% relocated, showing the greatest loyalty to their spouses.

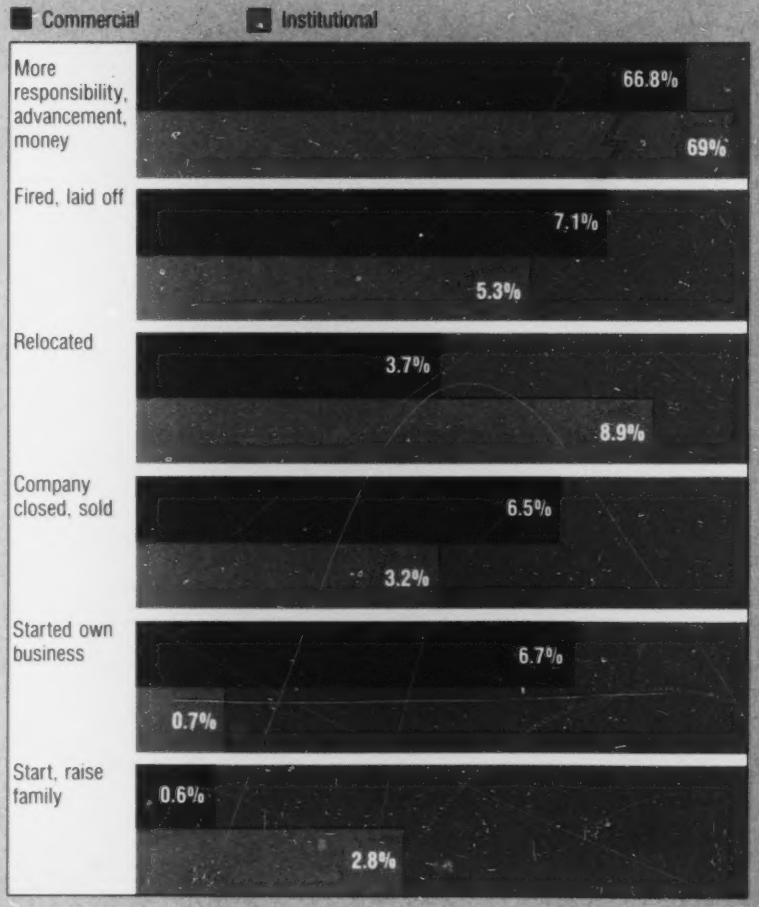
Crystal ball gazing: When it comes to loyalty and initiative, vice presidents, regional managers, and food and beverage directors want to stay with their current company and move up the ranks.

Besides owners and company presi-

continued on page 80

UPWARD AND ONWARD

More money, responsibility and advancement are by far the biggest reasons foodservice professionals left their last job. Assistant unit managers were the most likely candidates to be fired, while dietitians were busy relocating or leaving to start a family. This chart indicates why mangement employees left their last job.



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1987 JOBS SURVEY

THINKING ABOUT YOUR FUTURE OFTEN LEADS TO A FIVE-YEAR CAREER PLAN. GOOD NEWS FOR THE INDUSTRY: MOST OF YOU PLAN TO STAY IN FOODSERVICE.

dents, dietitians and foodservice directors are the most content with their current positions.

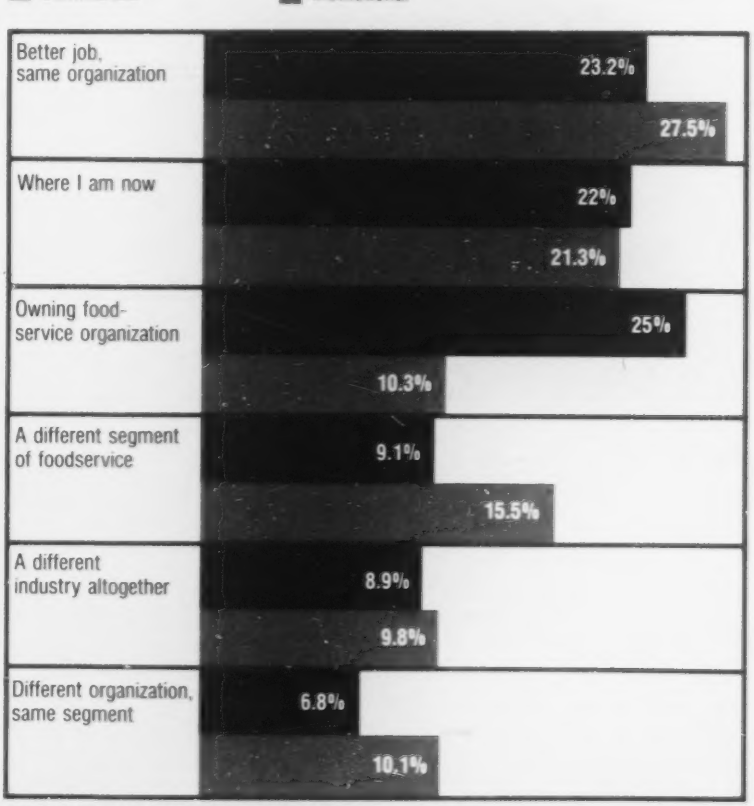
Almost 19% of the respondents expressed interest in owning their own foodservice operation. More than 46% of the chefs want to make a go of it on their own. One-third of the chain unit managers also want to make it on their own.

Nearly 23% of dietitians would like to move into another segment of the industry, almost double the average. Cooks appear to be an unhappy bunch, too. More than 21% want to stay in their segment, but with a different operation.

And who is fed up with the industry altogether? Almost 16% of assistant unit managers want to be in a different industry in five years, compared to a 9.3% average.

PLANNING FOR THE FUTURE

Vice presidents, regional managers and assistant food and beverage directors are most interested in moving up within the organization, while cooks show the most dissatisfaction with their current employer. Chefs and unit managers aspire to own their own operation, while 15.6% of assistant unit managers want out of the industry altogether. Here is where management employees would like to be in 5 years.



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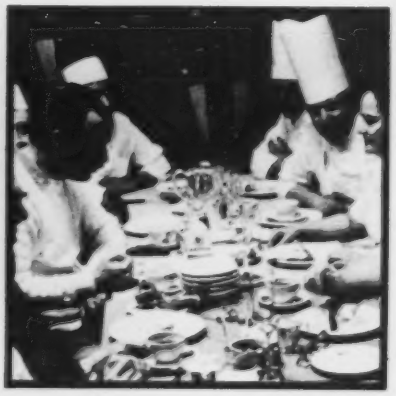

In mid-April, Sea Galley introduced a new lunch menu into 40 of its 41 stores. The menu features specials for $2.99, $3.99 and $4.99.

Sea Galley bets that the prices on its new lunch menu will increase customer counts during that time period.

"The news with this menu is the prices," says Ken Wilson, vice president and director of marketing for the 41-unit chain, which is based in Mountlake Terrace, Wash.

Sea Galley always has offered fast service, another tool used to draw lunch customers. Patrons with lunch-time limits are promised that lunch will take 40 minutes from the time they are seated.

The menu, introduced in mid-April in all Sea Galley stores except Anchorage, Alaska, offers lunch specials at $2.99, $3.99 and $4.99.

The $2.99 specials include a bowl of clam chowder or prime-rib soup with garlic cheese bread; fried clam strips with a cup of clam chowder; and fried calamari. For $3.99, lunch customers can choose between a deep-fried shrimp and fish plate; baked Pacific cod; New England-style snapper; and deep-fried shrimp. The $4.99 offerings include chicken stir-fry, seafood au gratin, sweet-and-sour shrimp and sole almondine.

Radio advertising in Seattle, featuring a local on-air personality, and print ads on the East Coast support the new lunch menu. Dinner patrons receive a small flyer promoting lunch at Sea Galley.

—Lisa Bertagnoli

■ R&I DATA

AVERAGE MENU PRICES: SIDE ORDERS RELAX

R&I tracks average selling prices for a variety of menu items at restaurants across the country. The latest survey results show that the average price for side orders such as chili and french fries decreased in all segments and in each region of the country.

Item	Full service	Fast food	Hotel/ motel	North-east	South	North Central	West
Beverages:							
Coffee	$ .67	$ .49	$ .80	$ .69	$ .63	$ .63	$ .66
Iced tea	.70	.57	.80	.73	.68	.66	.69
Soft drinks	.76	.60	.88	.81	.69	.76	.74
Beer	1.72	.95	1.79	1.81	1.58	1.72	1.55
Wine (glass)	1.91	1.22	1.91	1.91	1.94	1.75	1.78
Sandwiches:							
Hamburger	3.01	1.74	4.00	3.02	2.61	3.13	3.70
Cheeseburger	3.25	1.56	4.02	3.13	2.51	3.36	3.83
Ham & cheese	2.93	2.57	3.83	2.41	2.92	2.79	3.93
Club	3.63	2.19	4.55	3.79	3.71	4.00	4.29
Fish	2.74	1.95	3.47	3.08	1.79	2.83	2.91
Chicken patty	3.56	2.26	4.13	3.63	2.95	2.93	3.30
Other:							
Chili	1.81	1.29	2.29	1.73	1.38	1.55	2.11
French fries	.91	.71	1.02	.84	.83	.85	1.05
Scrambled eggs	1.91	1.15	2.32	2.16	1.80	1.91	2.20

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■ CONSUMER'S CHOICE

PROFESSIONALLY SPEAKING

When eating out in 1986, college graduates ordered Mexican food more frequently compared to 1985. While an overall average of 12.4% of the respondents increased their consumption of nachos, tacos and tortillas, 17% of college graduates were munching on Mexican food more often.

WHAT EVER HAPPENED TO THE BREAKFAST BOOM?

The breakfast boom began in 1983 with a resounding increase in breakfast traffic and sales. The drum rolls continued in 1984 across the industry. Breakfast business was still booming for some segments in 1985, but by 1986 (see "Barometer") the good times had rolled to a slow stop—or had supply simply caught up with demand?

The best news of the morning is: While the breakfast boom is over, breakfast business is still booming. And, as always in a competitive marketplace, the early bird will get the worm —by scoping breakfast tastes and trends today and by scooping trends to come in the next 10 years.

George Rice, president of Park Ridge, Ill.-based GDR Enterprises Inc., and spokesman for the CREST Report, launches our 10-year breakfast forecast: "We got where we are today because we had, in the mid-'70s, a real consumer demand that simply wasn't being satisfied by conventional breakfast places such as IHOP, Denny's, hotels, et cetera, who did a nice job but were very occasion-oriented.

"The big breakthrough—the convenience breakfast—

BREAKFAST BUSINESS

A business breakfast starts the day right at Hyatt Regency, Chicago.

was capitalized on by McDonald's. They stole customers from the then-classic breakfast restaurants, and they developed original purchase behavior in satisfying the need for convenience. People who customarily had skipped breakfast started to utilize fast-food restaurants.

"Now that market is satisfied. Breakfast continues to grow, but generally at the same rate as other meal segments."

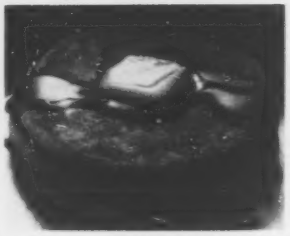
In projecting future trends, Rice looks at two big consumer groups that would affect breakfast: The baby-boomers who are married and now having children, and the seniors, whom Rice describes as a stable factor.

Rice views young first-time parents as the biggest potential loss to restaurants overall, but mostly in the evenings and on weekends. "It is quite possible that this may positively affect breakfast. With morning problems of child-care arrangements, young parents may be more inclined to utilize fast food out of the home."

Rice sees the biggest challenge as "How creative can the industry be in developing breakfast products? Today's market calls for product management, one of the most important areas of concentration in the next few years."

In addition to new breakfast product development, we suggest other areas crucial to getting a share of the breakfast business.

- Takeout and delivery, a continuing industry trend that will affect breakfast.
- Identifying the right market niche.
- Training wait staff for the special problems of breakfast service.
- Finding and keeping that rare and essential bird: the breakfast cook.



Flapjacks: Down home!

Po' Folks Puts on Big Breakfast

Nashville—Po' Folks has put breakfast on in a big way. "In all our restaurants, and by the summer's end, we hope for 100% participation from the franchisees," says Mike McNeil, director of marketing.

Po' Folks Country Morning Breakfast, served from 6 a.m. to 11 a.m., has a $3.40 check average—about $1 less than lunch. The least expensive item is two eggs, fries, grits and a biscuit, $1.89; most expensive, steak and eggs, $4.99.

The decision to put breakfast on the griddle was driven by market research, begun four years ago, and customer demand. "People kept saying, 'The menu has everything else. Why not add eggs?'"

So what took you Po' Folks so long? "Lunch and dinner parts are more profitable," says McNeil, "Service has to be faster *and* friendlier. And you always worry about cannibalizing your other dayparts. But so far, it hasn't, and we feel we can do breakfast well."

■ FAST BREAKS

Fast Food Is Still Making Morning News in the Breakfast Race

Egg McMuffin debuts in 1973; Burger King's French Toast Sticks in 1986. Next?

McDonald's research says 53% of U.S. breakfasts are eaten out—half of them at McDonald's. The Egg McMuffin is still a No. 1 seller, followed by from-scratch breakfast biscuits. Since Egg McMuffin came to breakfast in 1973, McDonald's morning customer's profile has grown from hard-hats and students to business people.

New ideas in the running include: Burger King's French Toast Sticks, and Egglets (hand-held omelets in test). Competing convenience stores sell not only breakfast items but time. And joint ventures (such as Dunkin' Donuts in c-stores) may be the wave of a tight real estate future. And how about the new cinnamon-roll chains with their tantalizing impulse items?

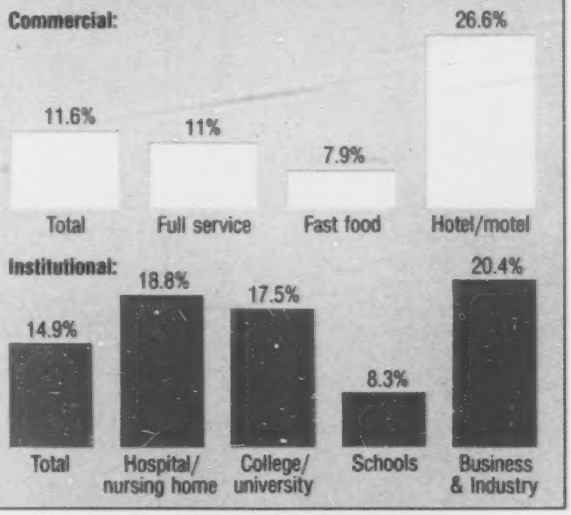
McDonald's No. 1: Egg McMuffin.

■ SALES AND TRAFFIC BAROMETER

BAROMETER

PERCENTAGE OF ANNUAL SALES FROM BREAKFAST

In *Restaurants & Institutions'* annual Menu Census survey, participants were asked "What percentage of your annual sales volume do the following meal periods account for?" Breakfast sales volume appears below. Schools, with the lowest breakfast sales volume in the institutional market, had 36,800 schools and 3.6 million children in the breakfast program as of April 1987.



Source: Cahners Bureau of Foodservice Research ©1987 *Restaurants & Institutions*, a Cahners Publication.

Total breakfast and a.m. snacks	+4.9%	+7.5%	+6.6%	−.7%
Quick-service restaurants	+7.6%	+6.2%	+14.3%	−2.3%
Midscale restaurants	+1.1%	+8.8%	−2%	−5%
Upscale restaurants	+8.3%	+11.4%	−4.3%	−2.2%

Source: CREST Report, a member of the NPD Group, Park Ridge, Ill.

RESTAURANTS & INSTITUTIONS

■ HUMAN RESOURCES

Gourmet Night: More Than All Right

Students pour energy and newly acquired skills into the annual event.

At 7:15 p.m., the servers were milling around in the kitchen area. "Why are we waiting here, anyway?" one said, in a plaintive tone. As the clock hands moved to 7:25, a manager-cum-student reminded them once again to serve guests from the left.

At 7:30, precisely, they streamed out into the dining room of the Conrad N. Hilton College of Hotel and Restaurant Management at the University of Houston. The occasion: a six-course gourmet dinner for 325 guests, including industry leaders.

Why do 300 HRM students spend hundreds of hours working for a successful Gourmet Night, without so much as a tip? The experience supplies a credential for their résumés, but more important is a school-of-life education in the logistics of preparing and serving a large banquet.

The groundwork for the March affair was laid in September, when General Manager Maria Sirgo chose an executive committee. Soon after, the students settled on a theme: "Hats Off to Hilton," celebrating the hundredth anniversary of Hilton's birth. The logo, a top hat with cane, was a natural, but how to illustrate the theme?

Hilton loved golf, but after pricing Astroturf, committee members decided instead to showcase Hilton's personal memorabilia. They abandoned research into Hilton's favorite foods when the trail ended in macaroni and cheese. Instead, the team decided to develop a simple, elegant menu.

Parsley sorbet and carrot/orange soup looked promising on paper, but failed to pass the taste test. Similarly, attempts at a dramatic presentation of the soup fizzled at first; the dry ice stopped foaming too soon, or froze the waiters' hands. Holding a dinner for 40 people, the committee used their reactions to fine-tune the menu.

In purchasing food and wine, the students had to stay within a budget of $19,000, generated by a per-person charge of $60. They also had to contend with kitchen and storage areas not built for feeding such a large crowd.

Meeting the morning after for a postmortem of Gourmet Night, the students were bleary-eyed but exuberant about the evening's success. Everyone praised the vegetarian plates prepared on request. Then someone mentioned that one had been for a member of the Hilton family, and Executive Chef Andy Economon's face fell. "Why didn't someone tell me?" he lamented. "I would have done something much better."

—Toni Lydecker

Student chefs prepare Gourmet Night dinner with studied skill.

HATS OFF TO HRM STUDENTS FOR A SIX-COURSE FEAST

Watercress vichyssoise

Salmon and herb cheese in puff pastry, with lobster sauce

Assorted fruit sorbets

Broiled veal medallion, stuffed with mushrooms, shallots and *foie gras*, with herbed rice pilaf

Salad with Georgia peanut dressing

Dessert Finale (marquis shaped like a top hat, with a white chocolate cane tipped to the side)

■ R&I DATA

LABOR COST INDEX: COMMERCIAL TRAINEES IN DEMAND

With greater emphasis being placed on retention because of labor shortages, management trainees showed salary increases in the April survey. The commercial average for starting trainees increased more than 5% over the previous period.

	Northeast	North Central	Southwest	West	Average commercial	Average institutional
Executive chef*	$28,235	$27,694	$30,628	$29,207	$30,355	$26,879
Manager*	21,439	19,598	20,369	19,625	22,688	18,291
Asst. manager*	18,054	16,564	15,214	15,604	15,942	17,006
Mgmt. trainee*	17,733	15,563	13,723	14,000	15,770	13,967
Cook**	241	228	216	205	205	242
Dishwasher**	173	152	160	132	139	168

Key: *annually **weekly

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